



Good day! Welcome! Thank you for joining us for the iMATCH webinar training. Before we get started, I want to touch on a few housekeeping items.

## About iMATCH

- ▶ Direct Certification system – used by SFAs to identify students eligible for free meal benefits via assistance programs (SNAP, TANF)
- ▶ System compares enrollment information from Infinite Campus and DSS data nightly
- ▶ Identical entries between the two files are matched, and listed on the corresponding school district list

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Just to touch base on what the iMATCH system is used for, and how it works...

## Features to Cover

- ▶ Obtaining Direct Certification List
- ▶ Direct Certification Notification Letters
- ▶ New Match Notification Email to SFA
- ▶ Determine daily change of Direct Cert List
- ▶ Direct Certification by school site
- ▶ File Search feature
- ▶ How to use the Potential Matches tab

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Today we will cover the following areas.

# Obtaining the Direct Certification List

- ▶ Student Eligibility
- ▶ Administration
- ▶ DC Matching
- ▶ Matched – All Match Methods selected

Student Eligibility System

Applications

Administration

Direct Approvals

DC Matching

Grace Period Letters

Patrons

Application Reports

Eligibility Reports

Configuration

DC Matching

Potential Matches Sibling Search Matched File Search

Academic Year: 2017 - 2018

Site Code: -- ALL -- Site: -- ALL --

Student Details: Last Name: First Name: ID: Grade: --All-- Status: ☒ Active ☐ Inactive

Date: ☐ File ☐ Effective ☒ Match From: To:

Match Method: ☒ System ☒ Sibling ☒ Manual ☒ Transfers

File Details: Case Number: Reset Apply

Options: ☒ Exclude Previously Notified Students ☒ Exclude Previously Free Students

We will first touch on how to obtain the direct certification list for your SFA, or school district.

After logging in, select Student Eligibility, Administration, and then DC Matching. Click the Matched tab, and make sure all of the match methods are selected.

The PrimoEdge software has added some 'exclude' boxes to help with load times. When the 'exclude' boxes are selected (as preset), the system would not display the following conditions:

**It would be suggested unselect the 'exclude' checkboxes.**

From here, you can click apply.

After clicking apply, the system will display all students in your SFA that are identified as directly certified for free meal benefits. We will touch more on this topic in the following slide.

# Exclude Checkboxes

The screenshot shows the 'DC Matching' software interface. At the top, there are tabs for 'Potential Matches', 'Sibling Search', 'Matched', and 'File Search'. Below these, there are dropdown menus for 'Academic Year' (set to 2017-2018) and 'Site' (set to -- ALL --). There are also input fields for 'Last Name', 'First Name', 'ID', and 'Grade'. A 'Status' section has checkboxes for 'Active' and 'Inactive'. A 'Date' section has radio buttons for 'File', 'Effective', and 'Match'. A 'Match Method' section has checkboxes for 'System', 'Sibling', 'Manual', and 'Transfers'. A 'File Details' section has a 'Case Number' input field. At the bottom, there are two checkboxes under the 'Options' section: 'Exclude Previously Notified Students' and 'Exclude Previously Free Students'. Both checkboxes are currently checked. There are 'Reset' and 'Apply' buttons on the right side of the interface.

## ► Un-check the Exclude Checkboxes

To re-iterate the point regarding Exclude checkboxes -

The PrimeroEdge software has added some 'exclude' boxes to help with load times. When the 'exclude' boxes are selected (as preset), the system would not display the following conditions:

- Students that have been previously notified by using the automated iMATCH notification letters
- Transfer students that had benefits in a previous school district
- Students that had a lower level of benefits (like TANF), and are now matched at a higher level of benefits (like SNAP)

**It would be suggested unselect the 'exclude' checkboxes.**

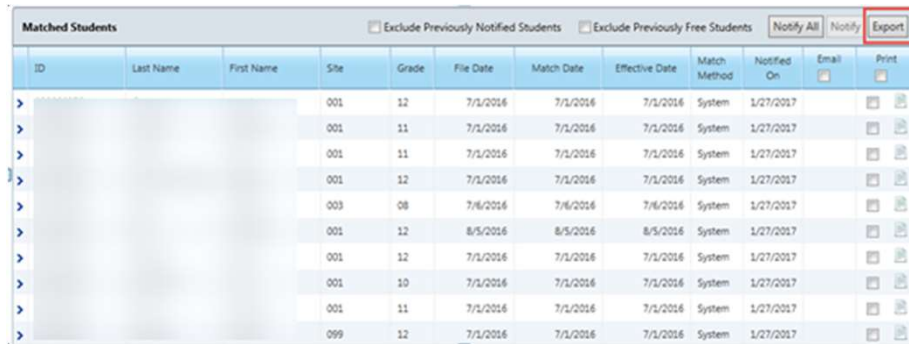
From here, you can click apply.

After clicking apply, the system will display all students in your SFA that are identified as directly certified for free meal benefits.

The following slide will discuss how to export the direct certification list into Excel format.

## Obtaining the Direct Certification List – Exporting

- ▶ Export allows to save full list in Excel format



The screenshot shows a web application titled "Matched Students". It includes two checkboxes: "Exclude Previously Notified Students" and "Exclude Previously Free Students". To the right are buttons for "Notify All", "Notify", and "Export" (which is highlighted with a red rectangle). Below these is a table with the following columns: ID, Last Name, First Name, Site, Grade, File Date, Match Date, Effective Date, Match Method, Notified On, Email, and Print. The table contains several rows of student data, with some rows expanded to show more details.

ID	Last Name	First Name	Site	Grade	File Date	Match Date	Effective Date	Match Method	Notified On	Email	Print
>			001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		
>			001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		
>			001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		
>			001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		
>			003	08	7/6/2016	7/6/2016	7/6/2016	System	1/27/2017		
>			001	12	8/5/2016	8/5/2016	8/5/2016	System	1/27/2017		
>			001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		
>			001	10	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		
>			001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		
>			099	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		

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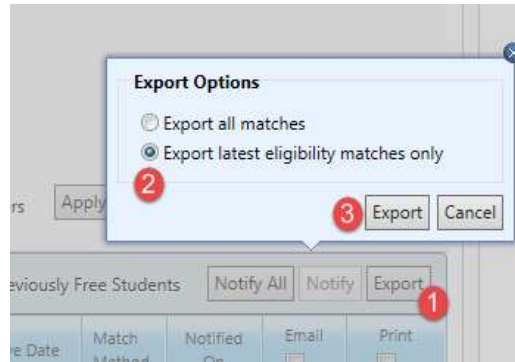
Export allows to save full list in Excel format

- This may be helpful for electronic point of service system uploading. Discuss with your school's technology coordinator.

We will continue on the following slide.

## Obtaining the Direct Certification List – Exporting

- ▶ Export allows to save full list in Excel format




After clicking 'Export' an 'Export Options' window will appear.

Select the radio button indicating 'Export latest eligibility matches only'. This will allow for your export to capture the most updated benefit information and will limit to a single entry display per student, and ensure that you are also including transfer students.

We will touch on notification letters on the following slide.

# Notification Letters



The screenshot displays a software interface for generating notification letters. The interface is divided into several sections:

- Header Bar:** Contains the title "Matched Students" on the left. In the center, there are two checkboxes: "Exclude Previously Notified Students" and "Exclude Previously Free Students". On the right, there are three buttons: "Notify All", "Notify", and "Export".
- Table:** A large table with 12 columns: ID, Last Name, First Name, Site, Grade, File Date, Match Date, Effective Date, Match Method, Notified On, Email, and Print. The table contains multiple rows of student data, which are blurred for privacy.
- Right Sidebar:** A vertical panel on the right side of the table. It contains a "Print" button at the top, followed by a series of icons representing different document types or actions.

The interface is designed to allow users to filter and generate notification letters for specific groups of students.

We will touch on how to set up your official fields for notification letters within the system on the next slide.



# Notification Letters

- ▶ System -> Sites and Users-> SFAs
  - Official tab

The screenshot shows the iMATCH system interface. At the top, there are two tabs: 'Student Eligibility' and 'System', with 'System' highlighted. On the left sidebar, there are several menu items: 'Sites and Users', 'Users', 'Roles', 'SFAs', 'Sites', 'Administration', 'Support Cases', 'Configuration', and 'Data Exchange'. 'Sites and Users' and 'SFAs' are highlighted. The main content area is titled 'SFA Details' and has four sub-tabs: 'Set Up', 'General Info', 'Officials', 'Sites', and 'Users'. The 'Officials' tab is selected. Below the tabs, there is a note: 'This information is used to populate letters. Blank fields may impact readability.' The form is for a 'Child Nutrition Director' and includes fields for Title (Director of Food Service), Email, UserId, Salutation (dropdown), First Name, Last Name, Street / PO Box, City, State (SD), Zip, Phone, and Fax. At the bottom, there is a section for 'Determining Official'.

If you are going to use the automated letters to notify households of direct certification benefits from the iMATCH system, select System at the top, then click Sites and Users. Next, click SFAs. You will next click the 'Officials' tab.

We will look closer on the next slide.

# Notification Letters

## ► Official tab – Determining Official

Determining Official

Title: Business Manager Email: [Redacted]

User Name: [Redacted] Salutation: --Select--

First Name: Jim Last Name: Johnson

Street / PO Box: [Redacted]

Address2: [Redacted]

City: [Redacted] State: SD Zip: [Redacted]

Phone: (605) 555-5555 Fax: [Redacted]

Save

Now that you are on the Officials tab, scroll down the page, and add information as needed. Remember, you would only need to do this if your SFA is planning on using the automated notification letters, and have indicated as such in your annual agreement with CANS.

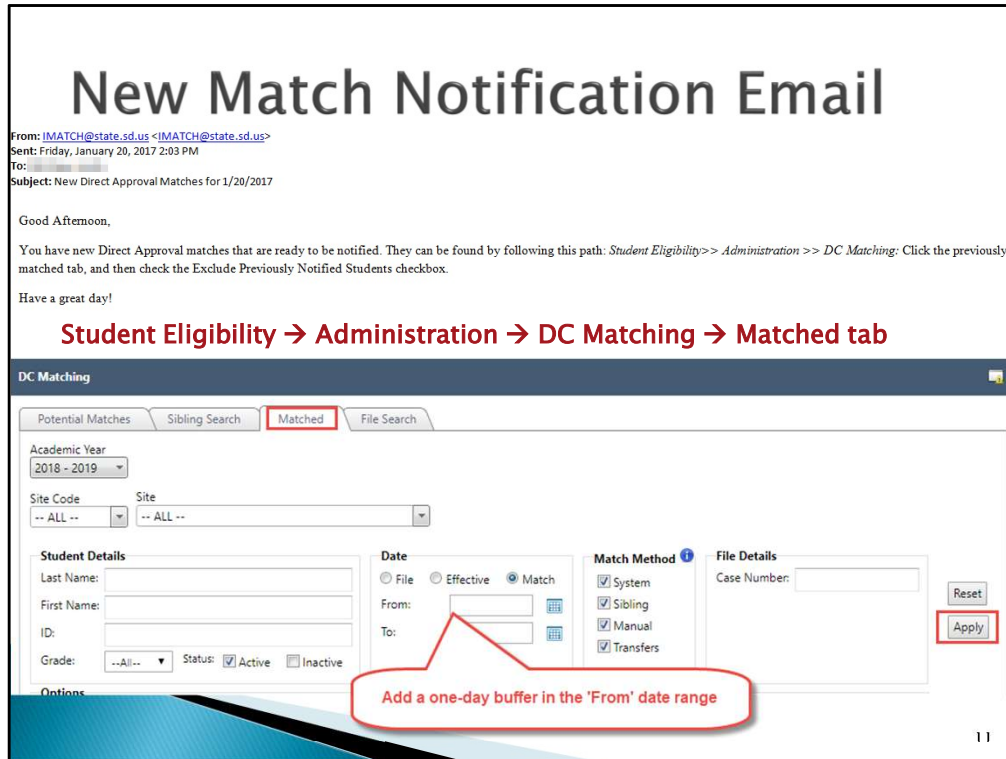
Only the Determining Official information would need to be completed, as the iMATCH system is not set up for any processes other than Direct Certification. Remember to include a phone number, in the event of a household needing to contact the school regarding the addition of a student to the household or refusal of benefits.

When you are completed providing information for your determining official, scroll to the bottom, and click Save.

The determining official's information provided in iMATCH will be automatically populated on the Direct Certification notification letters. Remember to include the same Determining official name in your annual iCAN application, for consistency.

If you are using the notification letters from iMATCH, it is suggested to look at the Print Preview prior to printing. Your school computer administrator may need to install a plug-in. If you run into system problems, contact PrimeroEdge may be of some assistance.

We will circle back to the Direct Certification List on the following slide.



The iMATCH system has a notification email, which sends a basic notification to all users in your SFA when a new match has been determined. The notification is not specific, but is to be used as an alert to check the system. Use the date range feature from the Matched tab to observe the new matches.

Due to one file being 'scanned' before midnight and the other file being 'scanned' after midnight, add an extra day on the front-end of your date range for best results.

If you have multiple school employees with an active iMATCH User ID, back-up users may consider reaching out to their technology coordinator to set up an email rule for automatic filing of these notifications. This said, it is still important for the primary user to keep an eye on these email notifications, and update the schools benefit issuance accordingly.

# Eligibility Hierarchy

- iMATCH identifies the hierarchy of direct certification benefits
- SNAP > TANF
- Supersede to direct certification – highest form of direct certification is SNAP

Patrons → Students → search for a student → click on the Student ID

The screenshot displays the iMATCH Student Eligibility System interface. The sidebar on the left contains a 'Patrons' tab (highlighted with a red box and number 1) and a 'Students' tab (highlighted with a red box and number 2). The main content area shows search filters for Site Code, Site, Grade, and Student ID/SSN. The 'Student ID/SSN' field is highlighted with a red box and number 3. The interface also includes fields for Last Name, First Name, Birth Date, and Status, along with 'Apply' and 'Reset' buttons.

One design aspect of the iMATCH system that we haven't really discussed before is iMATCH identifies the hierarchy of direct certification benefits for the assistance programs that it has access to.

- The system has access to SNAP and TANF – although these are commonly lumped together since they both yield free meal benefits, they are two distinct assistance programs for households.
- SNAP is considered the highest form of direct certification – we would always want to supersede to direct certification whenever available, but to take it a step further, supersede to SNAP.

Please keep this in mind, as a student may be matched with TANF early in the year – as the year goes on, if the student is matched with SNAP, you will receive an email alert.

You can see a student's historical data for eligibility, which can come in handy for situations like this.

Patrons → Students → search for a student → click on the Student ID

→ Click the Eligibility tab to see historical data

# Direct Certification List

## – Daily Change using Date Range

The screenshot shows the 'DC Matching' application window. At the top, there are four tabs: 'Potential Matches', 'Sibling Search', 'Matched' (which is selected and highlighted with a blue box), and 'File Search'. Below the tabs, there are several input fields: 'Academic Year' (set to 2018 - 2019), 'Site Code' (set to -- ALL --), and 'Site' (set to -- ALL --). The 'Student Details' section includes fields for 'Last Name', 'First Name', 'ID', and 'Grader' (set to --All--). There are also checkboxes for 'Status' (Active and Inactive). The 'Date' section is highlighted with a red box and contains three radio buttons: 'File', 'Effective', and 'Match' (which is selected). Below these are 'From:' and 'To:' date input fields, with red circles and numbers 1 and 2 respectively. The 'Match Method' section has checkboxes for 'System', 'Sibling', 'Manual', and 'Transfers'. The 'File Details' section has a 'Case Number' field. At the bottom right, there are 'Reset' and 'Apply' buttons, with a red circle and number 3 next to the 'Apply' button. Below the form, the text 'Student Eligibility → Administration → Matching' is displayed. The page number '13' is in the bottom right corner.

Here, we are back on the Matched tab, found in Student Eligibility -> Administration -> DC Matching.

As previously described, the 'Matched' tab also features a date range. Use the date range feature from the Matched tab to observe the new matches.

You can adjust the date range to determine when newly matched students are eligible. When using the date range, it is suggested to add an extra day to the 'From' box and the 'To' box, to ensure that you are capturing the information that you are looking for.

After a date range is entered, click apply.

The list of students displayed would come from only the date range identified.

We will show another organizing feature on the following slide.

# Direct Certification List

## ► Column Sorting

Matched Students											Notify All	Notify	Export
ID	Last Name	First Name	Site	Grade	File #	File Date	Match Date	Effective Date	Match Method	Notified On	Email	Print	
>			009	05	1973	7/2/2018	8/21/2018	7/2/2018	System	8/23/2018			
>			010	02	1973	7/2/2018	8/21/2018	7/2/2018	System	8/23/2018			

If you would prefer not to use the date range modifier, you can instead sort by columns from the Matched tab.

Here, you can click any of the columns in blue, to sort. Some SFAs may find it helpful to sort by match or effective date. The way that our software is set up, the Match Date and Effective Date will typically be the same date.

Hypothetically speaking, you could sort by the Match date, and scroll through the list, from the earliest matches up to the most recent matches. This can be beneficial when determining start date of eligibility.

Using the Matched tab is the suggested method to observe a district-wide list of students that have been matched in the iMATCH system, as this also contains a drop-down menu if you prefer to select a specific site within the district.

That said, we will show another method that can be used to observe a list of students broken down by site that have been matched.

# Direct Certification by Site

Student Eligibility → Administration → DC Matching → Matched tab

The screenshot displays the 'DC Matching' interface. On the left, a sidebar contains a menu with 'Student Eligibility' (highlighted with a red box), 'Administration' (highlighted with a red box), 'Direct Approvals', 'DC Matching' (highlighted with a red box), 'DC Compliance', 'Grace Period Letters', 'Patrons', 'Students', and 'Eligibility Reports'. The main content area is titled 'DC Matching' and features four tabs: 'Potential Matches', 'Sibling Search', 'Matched' (highlighted with a red box), and 'File Search'. Below the tabs, there is a 'Site Code' dropdown menu with a blue arrow pointing to it and the text 'Select a specific site'. The dropdown menu is open, showing 'Site' and '-- ALL --'. Below this, there are sections for 'Student Details' (Last Name, First Name, ID, Grade, Status), 'Date' (File, Effective, Match), 'Match Method' (System, Sibling, Manual, Transfers), and 'File Details' (Case Number). There are 'Reset' and 'Apply' buttons on the right, with 'Apply' highlighted with a red box. At the bottom right, the number '15' is visible.

There are multiple ways to do the same task – this is probably the easiest way to identify a list of students receiving benefits per a specific site within your School Food Authority.

Go to the Matched tab, as we have previously discussed.

Before selecting 'Apply', use the Site drop-down arrow to select a specific site. Now, when you click 'Apply', you will bring up a list of directly certified students that enrolled at the selected site.

We will look at another way to obtain this information on the following slide.

# Direct Certification by Site

- ▶ Student Eligibility
- ▶ Eligibility Reports
  - Eligibility (uncheck Paid, Reduced)
  - Reason (uncheck Default, Denied)

The screenshot shows the 'Student Eligibility' system interface. On the left is a navigation menu with options: Administration, Direct Approvals, DC Matching, Patrons, Eligibility Reports (highlighted), DC Sibling, Eligibility Roster (highlighted), and Configuration. The main area is titled 'Eligibility Roster'. It includes a 'Site Code' dropdown set to 'SITE', a 'Grade' dropdown set to 'ALL', and an 'As of Date' field set to '6/29/2016'. Below these are two columns of checkboxes. The 'Eligibility' column has 'Free' checked, 'Reduced' checked, and 'Paid' checked. The 'Reason' column has 'Uncheck All' checked, 'Categorical' checked, 'DC Transfer' checked, 'DC Foster' checked, 'DC Medicaid' checked, 'DC SNAP' checked, 'DC Unmatched' checked, 'Direct Cert' checked, 'Even Start' checked, 'Foster' checked, 'Grace Period' checked, 'Head Start' checked, 'Homeless' checked, 'Import' checked, 'Income' checked, 'Migrant' checked, 'Pre-Approval' checked, 'Principal Approved' checked, 'RCC' checked, 'Refused Benefits' checked, 'Removal' checked, 'Transfer' checked, and 'Verification' checked. There are also 'Options' and 'Include' sections at the bottom. A 'Generate Report' button is located at the bottom right of the interface.

Using the Eligibility Report, you are also able to obtain a list of directly certified students enrolled per site.

The Eligibility Roster is nice, as you can export data in an excel document, and have each tab in the excel document be a different site.

Follow these steps:

Click Student Eligibility,  
Eligibility Reports

In the Eligibility box, uncheck Paid, Reduced  
In the Reason box, uncheck Default, Denied

We will have a larger image on the following slide



# Direct Certification by Site

Student Eligibility

System

Administration

Direct Approvals

DC Matching

Patrons

Eligibility Reports

DC Sibling

Eligibility Roster

Configuration

Eligibility Roster

Site Code

--ALL--

Site

--ALL--

Grade

--ALL--

As of Date

6/29/2016

Eligibility

☒ Free
 ☐ Reduced
 ☐ Paid

Options

☐ Display Eligibility Code
 ☐ Display Contact Info
 ☐ Sort by Grade
 ☐ Only Verification Sites

Include

☐ Inactive Students
 ☐ Inactive Sites

Reason

☒ Uncheck All
 ☒ Categorical
 ☒ CEP Transfer
 ☒ DC Foster
 ☒ DC Medicaid
 ☒ DC SNAP
 ☒ DC Unmatched
 ☐ Default
 ☐ Denied
 ☒ Direct Cert
 ☒ Even Start
 ☒ Foster
 ☒ Grace Period
 ☒ Head Start
 ☒ Homeless
 ☒ Import
 ☒ Income
 ☒ Migrant
 ☒ Pre-Approval
 ☒ Principal Approved
 ☒ RCG
 ☒ Refused Benefits
 ☒ Removed
 ☒ Runaway
 ☒ Transfer
 ☒ Verification

Generate Report

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As we can see, there is also a site modifier at the top of the screen, if you wanted to change the report to one specific site.

Next, in the Eligibility box, as stated on the previous slide, you will want to make sure to 'un-check' Reduced and Paid.

Also, in the Reason box, you will want to make sure to 'un-check' Default and Denied.

We have highlighted the boxes to un-check. Once you have un-checked the necessary boxes, click 'Generate Report' in the bottom right corner.

After you click 'generate report', an additional window will be displayed. You can page through to find the different site reports. More on the following slide.

## Direct Certification by Site



- Arrows allow user to page through to additional students, or additional sites
- Floppy disk Save icon allows users to save file as Excel
  - Saving as Excel features each site to display as a different tab in Excel

- Arrows on the generated report allow the user to page through to additional students, or additional sites
- The Floppy disk Save icon allows users to save file as Excel
  - Saving as Excel allows for each site to display as a different tab in Excel
- If you intend on looking at site-based direct certification data, I would

suggest saving the document as an Excel document, as the list is more manageable and user-friendly.

Typically, SFAs with meal count software will use the full SFA-wide direct certification list found in the Matched tab, however, this site-based report may be helpful for schools using a manual meal count method, when eligibility is applied to student counts in the office afterward.

We will look at some search features on the following slide.

# Potential Matches

- ▶ Student Eligibility
- ▶ DC Matching
- ▶ Potential Matches

The screenshot displays the iMATCH system's 'Potential Matches' interface. On the left, a sidebar contains navigation links: 'Student Eligibility' (highlighted with a red box), 'System', 'Applications', 'Administration', 'Direct Approvals', 'DC Matching' (highlighted with a red box), 'Grace Period Letters', 'Patrons', 'Students', 'Application Reports', and 'Direct Approval'. The main content area is titled 'DC Matching' and includes sub-tabs: 'Potential Matches' (highlighted with a red box), 'Sibling Search', 'Matched', and 'File Search'. Below the tabs, there are input fields for 'Student Details': 'Last Name', 'First Name', 'ID', and 'Birth Date'. To the right of these fields are two filter boxes: 'Probability' with checkboxes for 'High' (checked) and 'Medium', and 'Compare Status' with checkboxes for 'Not Reviewed' (checked) and 'Reviewed'. 'Reset' and 'Apply' buttons are located to the right of these filters. Below the filters is a section titled 'Potential Match Details' with a table. The table has two main sections: 'PrimerEdge Student Details' and 'Certification File Details'. The 'PrimerEdge Student Details' section has columns for 'Student ID', 'Last Name', 'First Name', and 'Birth Date'. The 'Certification File Details' section has columns for 'ID on File', 'Last Name', 'First Name', 'Birth Date', and 'Probability'. The table currently displays 'No records to display.'

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The iMATCH system matches enrollment information from Infinite Campus with students identified from Department of Social Services that receive benefits. Various criteria between the two files is automatically compared. Criteria have certain 'points' assigned, for scoring an automatic match. When the comparison of the two files reaches 44 points, an automatic match occurs.

If the comparison of enrollment file and direct certification file result in a high point score, but not high enough to make an automatic match, the comparison of files can be found in the Potential Matches tab.

The first name, last name, and date of birth must match perfectly to get a 100% match. Students do not match 100% if there is a slight difference in the student's Infinite Campus record and the SNAP or TANF benefit information.

The Potential Matches tab features a probability ranking, which provides the likelihood that a student listed from DSS match a particular student entry from the enrollment information listed in Infinite Campus list for your school.

Prior to observing your list, you can select High and/or Medium probability to observe. Additionally, if a user has already reviewed particular entries in the Potential Matches tab, the 'Compare Status' checkboxes allow the user to only display entries which have not yet been reviewed.

Please Note: The system has

## Potential Matches Reviewing entries

The screenshot displays a web interface titled "Potential Match Details". It features two side-by-side tables. The left table, labeled "PrimeroEdge Student Details" (marked with a green border and number 1), has columns for Student ID, Last Name, First Name, and Birth Date. The right table, labeled "Certification File Details" (marked with a blue border and number 2), has columns for ID on File, Last Name, First Name, Birth Date, and Probability. A "Compare" button (marked with a red border and number 3) is positioned between the two tables. A "More..." link is visible at the bottom right of the interface. The page number "20" is located in the bottom right corner.

PrimeroEdge Student Details				Certification File Details				
Student ID	Last Name	First Name	Birth Date	ID on File	Last Name	First Name	Birth Date	Probability

As previously indicated, the Potential Matches list provides a list of students that have a high probability of matching, but did not meet the required amount of points for an automatic match to occur.

It is best practice to observe the High-probability student files first. Make sure that the 'High' probability checkbox is checked, then click apply.

The system will now only display student files that have a high probability of matching.

The column on the left, labelled 'PrimeroEdge Student Details' (identified on the slide by the green border and number 1) is the enrollment file from the school's Infinite Campus.

The column on the right, labelled 'Certification File Details' (identified by on the slide by the blue border and number 2) is the Direct Certification file from Department of Social Services.

The iMATCH system has made a comparison between the two files, and determined that the enrollment file on the left, and the direct certification file on the right, have very similar student data, but not similar enough for an automatic match to occur. This is where you come in.

You will see a link toward the middle of the two lists, labelled 'Compare'. This link is identified on the slide by the red border, and number 3.

When we click the 'Compare' link, the user will be able to look at specifics between the Enrollment file from the left side, and the Direct Certification file from the right side.

We will look at more detail on the following slide.

## Potential Matches

- Matching Criteria
- Reviewing possible match
- Making the Match

Matching Criteria	Student Details	File Details	Points
SSN			0
Student ID			0
Full Name			22
First and Last Name			0
Last and Middle Name			0
First and Middle Name			0
Last Name			0
First Name			0
DOB			0
Phonetic First Name			0
Phonetic Last Name			0
SOUNDEX First Name			0
SOUNDEX Last Name			0
Modified First Name			0
Modified Last Name			0
Name Twist Full Name			0
Name Twist First and Last Name			0
Variable DOB (±10 day(s))			0
DOB Month Year Twist			0
Street Address			0
Guardian			6
Phone 1			0
Phone 2			0
County Code(s)	Brown	Brown	12
<b>Total - 40 (High)</b>			

→

Match

Mark as Reviewed

Close

Here, we can see the ‘score card’ displaying the matching criteria, and comparing the student enrollment information with the direct certification information.

Since we are handling sensitive data, we do need to redact specific information for the purposes of this training.

We can see that the Student Details (also known as the enrollment information from Infinite Campus) and the File Details (also known as the Direct Certification File from Department of Social Services) have some consistent fields. The fields highlighted in green are consistent between the two files.

Only the school can know for sure if these two entries are the same student. If this is the same student, the data files can be manually matched. We will discuss more on the following slide.

If the school has determined that the student identified in the enrollment file from the Student Details column is the same student as the student identified in the direct certification file from the File Details column, the school can make a manual match.

In order to make a manual match, the user would click the ‘Match’ button displayed toward the bottom of the scorecard – identified on this slide by the red border, and red arrow.

The user also has the capability of marking the student as ‘reviewed’. Marking a student as



reviewed could be used if the user has identified that the student files displayed are not the same student.

# File Search

- ▶ Student Eligibility
- ▶ Administration
- ▶ DC Matching
- ▶ File Search

The screenshot shows the 'DC Matching' application interface. At the top, there are tabs for 'Potential Matches', 'Sibling Search', 'Matched', and 'File Search'. The 'File Search' tab is selected. Below the tabs, there is a 'Search By' section with three radio buttons: 'SSN and Birth Date', 'Name and Birth Date', and 'Case Number'. The 'Case Number' radio button is selected. To the right of the radio buttons is a 'Details' section with a 'Case Number' input field, which is highlighted with a red box and a red circle with the number 1. To the right of the input field are 'Reset' and 'Apply' buttons, with the 'Apply' button highlighted by a red circle with the number 2. Below the search section is a 'File Details' section. It contains a table with two main columns: 'PrimerEdge Student Details' and 'Certification File Details'. The 'PrimerEdge Student Details' column has a 'Match Card' button, which is highlighted with a red box and a red circle with the number 3. The 'Certification File Details' column has a 'View Details...' button, which is highlighted with a green box and a green circle with the number 4. The table has several columns: 'Match Card', 'ID on File', 'Last Name', 'First Name', 'Birth Date', 'Case Number', 'DC Type', and 'File Date'. The page number '22' is visible in the bottom right corner.

Schools can use the 'File Search' tab to locate students to determine if they have benefits.

The File Search tab can be found in the same section as the Matched tab – click Student Eligibility, Administration, DC Matching, and then click File Search.

Select the radio button which you wish to search by.

Schools commonly use this feature to validate Case Numbers written on applications, however, we have recently been informed that all search categories conduct state-wide searches.

As a reminder, the school is to provide categorical benefits at face value when a sensible case number is provided on an application. If the school chooses to validate the case number in the iMATCH system, the student's eligibility can be considered as 'directly certified', which can extend to other enrolled children in the household. If the case number cannot be found in the system, the school should follow up with the household.

An additional note – the full case number must be entered in the File Search. Case numbers in South Dakota are 9 digits long, and always have at least 1 lead-zero. So, for example, If a household provided a six-digit case number on a household application without any lead-zeroes, you may need to enter three lead-zeroes, and then the case number provided.

We will discuss how to make manual matches from the File Search tab on the following slide.

# Manual Match from File Search

The screenshot shows the 'DC Matching' interface with the 'File Search' tab selected. The 'Search By' section has 'Case Number' selected, and the 'Details' section has 'Case Number' entered (highlighted by a red box with a '1'). The 'Apply' button is highlighted by a red box with a '2'. Below this, the 'File Details' section is divided into 'PrimerEdge Student Details' and 'Certification File Details'. In the 'PrimerEdge Student Details' section, the 'Match Card' area has an ellipsis button (highlighted by a red box with a '3') and a 'View Details...' link (highlighted by a green box with a '4'). Below this is the 'PrimerEdge - Lookup' section, which includes fields for 'Site Code', 'Site', 'Grade', 'Student ID/SSN', 'Last Name', 'First Name', 'ID/SSN', 'Birth Date', and 'Status'. The 'Search' button is highlighted by a red box. A table at the bottom shows search results with columns: Name, Student ID/SSN, Site Name, Grade, Homeroom, and Birth Date.

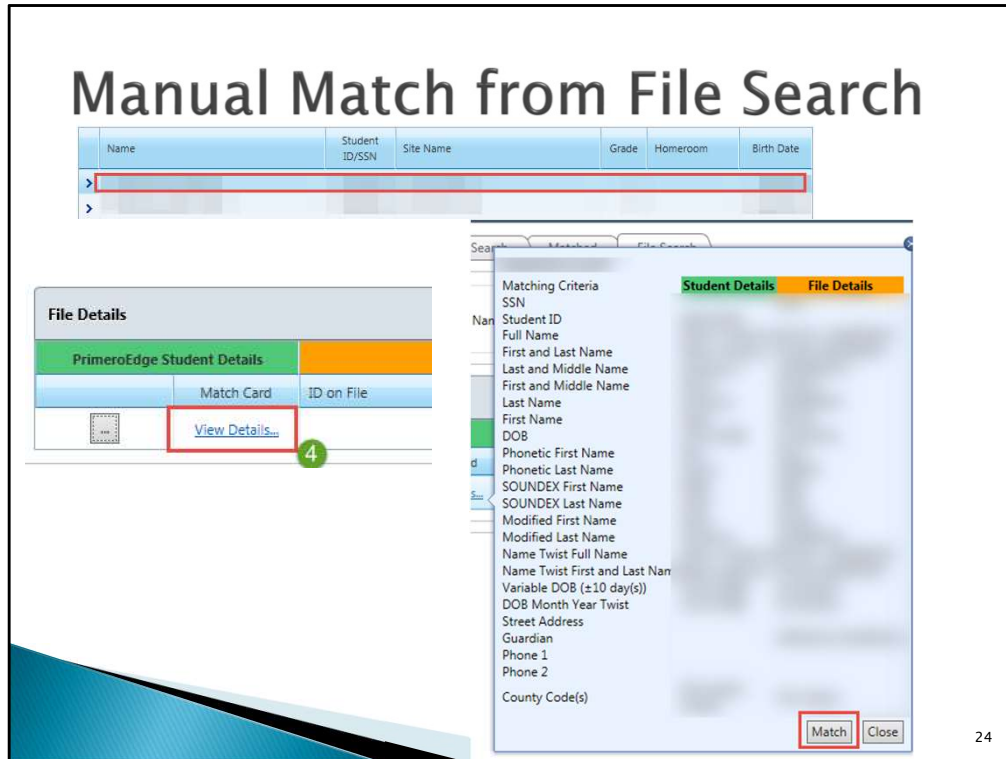
If you would like to make manual matches from the File Search tab,

- First, enter the search data (such as a case number) and click 'Apply'; You may see an ellipses (3 dots) in the Student Enrollment details (as seen by number 3)
- Click the ellipses to bring up the Student Lookup page. This is where you are identifying which enrolled student to compare to the direct certification list
- Consult your student enrollment, and make sure to enter the student name which corresponds with the name identified in the Certification File Details.

-After typing in the student name, select the name from the results list below, turning the students name blue, then click OK.

- These steps tell the system which enrolled student you wish to compare with the direct certification file details.

We will continue on the following slide



After we have selected the enrolled student which we feel is potentially the student identified in the Direct Certification File details (from the orange header), we will click 'View Details' back from the File Search page.

'View Details' brings up the scorecard, which you may remember from the Potential Matches tab.

Here, we are able to compare the Student Enrollment File with the Direct Certification File, to make a logical decision on whether we should match the student files.

If you are sure that the enrolled student in the Student Details list is the same student as the student identified in the Direct Certification list, you may click the Match button.

Remember to make sure that you are updating your point of service system to reflect proper student eligibility.

# Sibling Search

The screenshot shows a web interface for 'DC Matching'. At the top, there is a dark blue header with the text 'DC Matching'. Below this, there are four tabs: 'Potential Matches', 'Sibling Search' (which is active), 'Matched', and 'File Search'. Under the 'Sibling Search' tab, there is a section labeled 'Method'. This section contains four radio buttons: 'By Household' (which is selected), 'By Address', 'By Guardian', and 'Manual'. To the right of these radio buttons is an 'Apply' button.

**Find extended-eligible students based on household, address, guardian, manual**

**Be extremely careful when conducting Sibling Search**

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Sibling Search is another feature which can help find matches, however, most schools may extend benefits outside of iMATCH, assuming the school knows the household makeup. Other schools may utilize the File Search tab, instead.

It is extremely important to remember that when utilizing the Sibling Search, the operator must be able to determine whether to process the match. The iMATCH system may make a logical pairing of an identified student with other potential students, but the operator must be able to ensure that the pairing is appropriate prior to processing the match.

When in Sibling Search, the operator selects the appropriate radio button, identifying the type of method to use. Methods include Household, By Address, By Guardian, and Manual.



Again, be extremely careful when using the Sibling Search section. Remember that iMATCH is a tool to help determine direct certification for SNAP and TANF. The school must make sure to update their own Point of Service system or eligibility roster to make sure that students are being issued proper benefits and meals are being claimed properly.



## iMATCH User Training

This training credits for 45 minutes of training in

### Key Area 3 – Administration

3120 Direct Certification

Your Name:

Date of Training:



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Please be sure to document time spent on this training in your training tracker. Keep track of the name of participants, date of training, and time spent on the training, along with the Key Area and training code for Direct Certification.

# Thank you!

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Please feel free to contact the CANS office or PrimeroEdge with any questions.

Thank you for observing the training webinar on iMATCH.